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HAMMER, SILER, GEORGE ASSOCIATES
ECONOMIC CONSULTANTS

1140 Connecticut Ave., N. W.
Washington, D. C. 20036
202/223-1100

June 18, 1981

Mr. Matthew A. Coogan, Project Coordinator
Boston Redevelopment Authority
City Hall
One City Hall Square
Boston, Massachusetts 02201

Re: Downtown Crossing Market
Analysis

Dear Mr. Coogan:

The request for qualifications from consultants to take part in a comprehensive planning effort of Boston's central retail district (Downtown Crossing) dated June 8, did not reach our office until June 16. In turn, I was out-of-town on both the 16th and 17th. I attempted unsuccessfully to reach you by telephone today to express our interest in being considered as your market consultants although our formal response is a day or so beyond your stated deadline. Even though I was unable to directly contact you, you will find the credentials which BRA requested enclosed with this letter.

Hammer, Siler, George Associates and the undersigned have an established track record as consultants to the retail industry. We have been involved in major downtown projects, inner city neighborhood projects as well as suburban projects. We have performed market studies for developers and retailers alike on behalf of projects ranging in size from convenience neighborhood to regional department store anchored complexes. Our downtown experience includes some of the significant projects in the country.



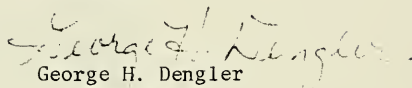
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Mr. Matthew A. Coogan
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We would appreciate an opportunity to submit a proposal for this project.

Sincerely,


George H. Dengler
Vice President

GHD:bo'd
Enclosures

SPECIAL QUALIFICATIONS AND EXPERIENCE
HAMMER, SILER, GEORGE ASSOCIATES
CENTRAL BUSINESS DISTRICT STUDIES

Hammer, Siler, George Associates has been in the economic and market research business for over 27 years. Throughout that long tenure in the applied research and consulting field, the firm has participated in downtown revitalization efforts in over 60 cities throughout the nation.

HSGA over the years has served a rather even mix of both public agencies and private development firms and thus performs downtown economic research in the perspective of both private profit-oriented and public interest-oriented groups.

Basic Approach and Functions

The expertise of the firm extends beyond market research and forecasting to participating in plan development and implementation. Each of the functions typically performed by HSGA is described below:

1. Market Research. Detailed analyses of the size and characteristics of each downtown activity type -- retail, office, hotel, service, housing, specialized processing and civic functions -- based on data on past and present occupancy, sales, construction, employment, land values and tax revenues, floor space, regional competitive structure, market area population and income growth, downtown accessibility, parking and efficiency and other factors.
2. Development Potentials. Determination of the specific opportunities for attracting new private investments into the downtown in terms of hotel rooms and supporting facilities, convention arena and theater, retail shoppers goods,

convenience goods and services, public and private office space for local, regional and national special purpose and general purpose tenants, high-rise, medium-rise and town/garden housing for the subsidized, standard and luxury markets and specialized industrial functions. Forecasts include the amount of land and floor space, the recommended locational pattern and configuration, the required supporting public and private amenities, units and sales price data and others as required.

3. Development Strategy. Design, testing and refinement of the comprehensive strategy of public and private investment and total action required to realize the development potentials forecast. Important inputs to this strategy development are made by design, planning and traffic consultants and the result is a detailed and time-specific set of recommended actions. Development and implementation of a successful strategy requires intensive participation and commitment by the various parts of the public and private decision structure in the community.
4. Private Investment Packaging. Downtown revitalization is in reality a set of individual public and private investment projects. The private investment projects or "packages" are designed based on: market potentials, key tenant commitments, achievable rent/price levels, land and assembly costs, short- and long-term financing available, creative use of federal and state programs, broad community equity participation and investor needs.
5. Public Fiscal Impact. Downtown represents the largest single concentration of local tax revenue and revitalization has a major impact on local fiscal health. Public fiscal impact of individual projects and the revitalization effort in total is determined based on before and after land and improvement values, property tax revenues, sales, hotel, restaurant and other "user" taxes, adjoining property appreciation, capital cost and amortizations of capital outlay, operating costs, revenue bonds and community development corporation funding.
6. Public and Private Merchandising and Promotions. The image of the downtown to the metropolitan resident is often a negative one caused by years of physical deterioration and in some cases poor merchandising and promotion. Our assignment optimally includes a thorough analysis of the

merchandising and promotional aspect of downtown revitalization and the design of a program for changing the short-term and long-term image of downtown and its individual businesses for retail customers, conventioners, businessmen and others.

CORE CITY RETAIL STUDIES

Hammer, Siler, George Associates has long experience in commercial analysis for public and private clients. In over 50 cities across the country the firm has closely analyzed the downtown retail structure, the impact of suburbanization upon it, the ways and means of revitalizing the commercial core, and the impact of various developments on local businesses. These studies have provided us with a broad understanding of commercial markets from the standpoint of both the tenant and the developer and the governmental structure which is affected by them. Several of the projects in which we have been involved are described in some detail below.

Baystate West, Springfield, Massachusetts. The basic market and financial analysis completed some years ago and the continuing project-by-project participation of the firm have played a key role in the successful development of the multi-use Baystate West core block project and related development. Included in the project are the first new major office building in many years, a major motel, a civic center arena, a retail mall connecting department stores with the office and hotel buildings, and a parking structure. A key role was played in this project by both urban renewal and active participation and investment by local business interests with HSGA playing the role of strategist and coordinator. The success of this project has stimulated additional department and specialty stores on adjacent blocks.

Binghamton, New York. Under contract to the Binghamton Urban Renewal Agency, Hammer, Siler, George Associates performed economic studies in connection with a multi-purpose retail development in the downtown urban

renewal area. The firm evaluated the Binghamton retail market and the future need and potential for new retail developments in that market. The analysis specifically included analysis of current department store sales, current and projected market conditions, and analysis of new competitive retail developments in the area.

A comprehensive analysis of the present downtown retail structure was conducted in order to identify quantitative and qualitative merchandising voids which could potentially be filled by the proposed development. Finally, a marketing strategy for the project was recommended. The resulting downtown redevelopment effort has been highly successful, with a new department store, other retail, hotel, and office space being developed.

Spartanburg, South Carolina. HSGA was retained to organize and coordinate a central area study. The basic market and financial analysis conducted by the firm provided guidance to the planner's work in terms of forecasts of development potentials, identification of downtown's assets and the obstacles which must be overcome, specific recommendations as to immediate action projects, and guidelines for identifying the general scale, character, and direction of growth in the downtown area. HSGA helped develop a realistically phased and financially feasible implementation program which has resulted in the completion of a two-block pedestrian mall in the retail core, and actions leading to the redevelopment of an entire block by a private developer, and a new convention center.

Winston-Salem, North Carolina. The actual new construction which has been generated by a plan and implementation program for which HSGA has been consultant for several years include: major new headquarters office structures for the state's two largest banks; a third major

office building; a shopping mall; a Regency Hyatt Hotel; a convention center; a federal building and city-county courts complex; and an intensive program of rehabilitation of existing retail stores.

Indianapolis, Indiana. HSGA performed an in-depth land use analysis for the CBD, including considerations of retail, office, hotel and housing uses. Retail development potentials were identified based on several alternatives, including introduction of a second level walkway connecting major anchors, new and better quality retail lines, parking and other solutions. The city has utilized the results in current efforts to attract a retail developer to the downtown project.

Jamaica, Long Island, New York. HSGA studied the retail structure and conditions in Jamaica Center with the objective of strengthening its economic viability. Recommendations were made for: the conversion and reuse of existing structures; cutting back some retail offerings and introducing others; developing other land uses; devising strategies for implementing a plan.

Canal Square, New Orleans. HSGA performed a CBD study to determine the market potential for a major specialty center retail complex adjacent to both the French Quarter and the existing CBD retail complex. A Saks unit, boutique and fashion shops, restaurant and entertainment facilities are under development in the Canal Square project.

Omni, Miami. HSGA performed market analysis studies for the developer of the Omni complex in Miami's "uptown-downtown" on Biscayne Boulevard. The resulting development has connected a new department store and specialty retail center to an existing formerly "freestanding" department store. A third department store is immediately across the street from the Omni: sales acceptance levels have been exceedingly

high and the center is a dominant one in the large Miami market. A new hotel is also part of the complex.

Miami Center, Miami. HSGA performed a market analysis study for the developer of a proposed fashion retail center immediately adjacent to the traditional downtown Miami retail core (Flagler Street). The proposed multi-use development would include fashion department stores and specialty shops as well as office and condominium apartment towers.

Washington, D.C. HSGA performed a market and strategy study for a major department store organization faced with declining sales downtown and an old plant on the weaker end of the retail core. All aspects of the downtown market were evaluated, including alternative locational options. The study has resulted in a decision to relocate the store approximately seven blocks as part of a major multi-use redevelopment part of a major multi-use redevelopment project adjacent to the stronger sector of the retail core. The old site will probably find reuse as a complement to a large convention center and support facilities being constructed in that area.

Other current and recent studies involving downtown retailing which have been performed by HSGA include the following cities:

Atlanta, Georgia	Pittsburgh, Pennsylvania
Baltimore, Maryland	Philadelphia, Pennsylvania
Chattanooga, Tennessee	Richmond, Virginia
Greenville, South Carolina	Salem, Massachusetts
Hartford, Connecticut	Schenectady, New York
Manchester, New Hampshire	Syracuse, New York
New Britain, Connecticut	Wilmington, Delaware
Norfolk, Virginia	Winston-Salem, North Carolina

GEORGE H. DENGLER
Vice President
Hammer, Siler, George Associates

George Dengler is a Vice President of Hammer, Siler, George Associates. As an urban economist, Mr. Dengler has directed and participated in various privately and publicly sponsored studies covering such diverse fields of specialization as downtown revitalization, urban renewal and community renewal program planning, regional and local economic base, new town development and market feasibility analysis for individual projects encompassing most land uses.

Mr. Dengler's experience in downtown revitalization involves the preparation of land use planning and marketability studies for both new projects and rehabilitation efforts in a number of cities. For urban renewal projects, he has conducted land use marketability studies, reuse appraisals and disposition consulting with local public agencies. His community renewal program experience includes involvement in improving the quality and restoring viability in the housing and commercial fields. Experience in new town planning includes both "new town" and "new-town-in-town" concepts. Land use market analyses undertaken by Mr. Dengler for specific projects include regional and inner-city shopping centers, residential housing, office space, audience support facilities (convention centers, stadiums, arenas, etc.), hotels, special projects, and others.

Prior to his association with Hammer, Siler, George Associates, Mr. Dengler spent 11 years with the economic consulting firm of Larry Smith & Co., Ltd., where he became a company Vice President. While serving in three offices of that firm, he worked on a national basis serving public and private clients in the economic development field.

He also served as an Associate with the Health and Welfare Council of Baltimore, a social welfare planning organization. While with the Council, Mr. Dengler helped develop the technical report for Baltimore's anti-poverty program. He has taught political science at Dickinson College in Pennsylvania and the College of William and Mary in Virginia.

Mr. Dengler holds a B.A. degree from Washington College (Md.) and an M.A. degree from the University of Rhode Island.

GEORGE DENGLER

Recent Downtown and Inner City Redevelopment Studies

Department Store Sales Opportunities
Downtown Louisville Galleria Site
Louisville, Kentucky
for: Oxford Properties, Ltd.

Land Use Potential and Reuse Appraisal Evaluations
Ossining Village Center Project, Ossining, New York
for: Village of Ossining, New York

Market Potential for Upper Darby CBD
Upper Darby, Pennsylvania
for: Kling Planning, Philadelphia, Pennsylvania

Market and Financial Feasibility Analysis
Park Madison Project
Plainfield, New Jersey
for: The Housing Authority of Plainfield
and the Downtown Policy Committee

Sales Opportunities for
Hochschild Kohn, Charles Center Site
Baltimore, Maryland
for: Supermarkets General Inc.

Transient Housing Study
Binghamton, New York
for: Binghamton Urban Renewal Agency

University City Market and Financial Analysis
Downtown Newark, New Jersey
for: City of Newark, New Jersey

Optimum Land Use Program, Phase 1
River Parks Project
Tulsa, Oklahoma
for: The River Parks Authority

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Recent Downtown and Inner City Redevelopment Studies (Continued)

Golden Triangle and Environs Development Potential
Pittsburgh, Pennsylvania
for: Allegheny Conference on Community Development

Preliminary Evaluation of Market Opportunities
American Brewery Site, Baltimore, Maryland
for: The Leon Bridges Company

Market Potential Analysis
Progress Plaza West
Philadelphia, Pennsylvania
for: Progress Development Services Corporation

Revenue Projections
Volunteer Bicentennial Park
Memphis, Tennessee
for: City of Memphis

Land Use and Marketability Study
Tyrone Disaster Urban Renewal Area
Tyrone, Pennsylvania
for: Redevelopment Authority of the County of Blair

Canal Place Retail Potential
New Orleans, Louisiana
for: Canal Place Venture

Luxury Condominium Development Potential, Harbor West
Baltimore, Maryland
for: Oxford Development Corporation

Scott Street Housing Redevelopment Potential
Baltimore, Maryland
for: Oxford Development Corporation

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Recent Downtown and Inner City Redevelopment Studies (Continued)

Civic Center Secondary Development Area Land Use Opportunities
Miami, Florida
for: Miami Planning Department

Miami Center Commercial Development Potential
Miami, Florida
for: Holywell Corporation

Redevelopment Opportunities in the Miami Beach Art Deco District
Miami Beach, Florida
for: Anderson, Notter, Finegold, Inc. (subcontract)

Downtown Indianapolis Rehabilitated Office Space Potential
Indianapolis, Indiana
for: Washington Towers Investment Group

Downtown Commercial and Housing Development Opportunities
Owensboro, Kentucky
for: David Hocker Associates

Cultural and Civic Center Analysis/Downtown Owensboro
Owensboro, Kentucky
for: Skidmore, Owings, Merrill (subcontract)

Upper Albany Neighborhood Revitalization Potential
Hartford, Connecticut
for: Hartford Development Process

Jamaica Center Development Potential
Jamaica (Queens), New York
for: Jamaica Development Corporation

Salem Green Redevelopment Project Land Use Opportunities
Salem, Massachusetts
for: Mondev International

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Recent Downtown and Inner City Redevelopment Studies (Continued)

Manchester Center Commercial Opportunities
Manchester, New Hampshire
for: Mondev International

Atlantic City Megastructure Project Land Use Opportunities
Atlantic City, New Jersey
for: Angelos Demetriou, Architect (subcontract)

Downtown New Brunswick Hotel Opportunities
New Brunswick, New Jersey
for: New Brunswick Tomorrow

Main Street Station Mall Commercial Opportunities
Richmond, Virginia
for: Main Street Station Associates

Market Study for the Park West Corridor
Milwaukee, Wisconsin
for: Department of City Development

Retail and Office Potential for Market Place
Inner Harbor, Baltimore, Maryland
for: Market Place Associates

Retail Potential for a Rehabilitated Factory
Fells Point, Baltimore, Maryland
for: NC Associates

Market Study for Downtown
Chattanooga, Tennessee
for: Chattanooga-Hamilton County Regional Planning Commission



GEORGE H. DENGLER

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George Dengler is a vice president of Hammer, Siler, George Associates. As an urban economist, Mr. Dengler has directed and participated in various private and public sponsored studies covering such diverse fields of specialization as downtown revitalization, urban renewal and community renewal program planning, regional and local economic base, new town development and market feasibility analysis for individual projects encompassing most land uses, including retail.

His working experience in the retail industry includes conducting market analyses for regional shopping centers; specialty/fashion center and specialty commercial developments; community/neighborhood shopping centers; as well as for department store strategy studies. These analyses have been conducted for developers and retailers throughout the United States. In addition, he has worked on inner-city and downtown retail revitalization projects ranging in size from neighborhood oriented projects like Progress Plaza (Philadelphia) and Old Town West (Chicago) to the redevelopment of Baltimore's retail core.

Mr. Dengler's retail work includes analyses conducted for the following organizations and stores:

Shopping Center Developers

Jack Jacobs and Company
Copaken, White and Blitt
Kravco, Inc.
Oxford Development Group, Ltd.
Pantlin and Chananie Dev. Corp.
Grimmer Realty Co., Inc.
Kenilworth Assoc., Inc.

Supermarkets General Corp.
Don M. Casto Org.
Richard Rubin & Co., Inc.
Hartz Mountain Industries, Inc.
The Shopco Corp.
Roberts and Willey
Development Control Corp.

Department Stores

Hochschild, Kohn & Co.
Carson, Pirie, Scott
J.C. Penney Co.
Belk-Lindsey

Hudson Belk
Joseph Spiess Co.
Macy's
Belk-Beery

